



**AGED Trust is a non-profit 501(c)(3) trust company** founded in 2002 to assist elderly and disabled individuals throughout Florida who, because of income and/or asset limits, normally would not qualify for federal, state, and local benefits such as Medicaid.

Located in Central Florida, **AGED Trust serves as trustee** for the following types of Special Needs Trusts:

- First Party d(4)(A) Under 65 Disability Special Needs Trusts
- First Party d(4)(C) AGED Pooled Special Needs Trust
- First Party d(4)(C) Florida Public Guardianship Pooled Special Needs Trust
- Third-Party Supplemental Needs Trusts (Pooled and Non-Pooled)

**Accounts of any size are accepted** – no minimum or maximum

**Community Support:** AGED gives back to the senior and disabled community by supporting advocacy and guardianship needs within the State of Florida, and by providing resources and training on issues impacting the senior and disabled community.

Executive Director – Nick Barton

Sr. Trust Advisor – Sharon Reich

Legal Advisors – Hoyt & Bryan, LLC

Accounting/Tax Services – HMS CPA's, PA

# The AGED Difference

- **Account Transparency:** Beneficiary advocates have online access to view trust account activity, balances, and statements. Quarterly statements are also provided.
- **Benefits Support:** AGED Trust has Benefit Specialists on hand to assist our clients with Medicaid applications, questions, and issues.
- **Prompt Customer Service:** Your calls are answered by a live person. We have a dedicated customer service team who respond quickly to client needs.
- **Multi-level approvals:** We protect your funds by requiring multiple levels of internal approval for trust and company fund transfers
- **Pooled Trust Retained Funds:** May be used for other disabled beneficiaries.
- **Leave money to Heirs:** AGED's pooled trust can be structured to leave the remaining funds to heirs after Medicaid payback.
- **Public Guardianship Support:** AGED is the administrative trustee for the Florida Public Guardianship Pooled Special Needs Trust. Retained funds directly support Public Guardianship.

# AGED Community Support

- **Guardian Benevolent Fund** – A program developed to provide partial payment to Professional Guardians and their Attorneys for services rendered to wards whose funds are inadequate to pay for services. Over \$2.5 Million has been paid out to support Professional Guardianship in Florida.
- **Community Hospital & Guardianship (CHG) Program** – Designed to help patients who have difficulty discharging from a hospital or facility due to capacity concerns.
- **Guardian Peer Support & Mentoring Group** – A place for Florida’s Professional and Public Guardians, their staff, and retired Guardians to come together to share resources, discuss challenges, and uncover creative solutions to difficult issues to support one another in a challenging and unique profession.
- **Florida Adaptive Sports (FAS) Program** – A social sports club that keeps disabled Floridians of all ages healthy and active for life by providing an outlet for friendship and activity. FAS has two adaptive rowing boats used for adaptive rowing program at the Lake County Rowing Association.
- **Rapid Resource Directories** – Contain valuable resources to help professionals better serve their clients. Available online and in print.
- **Training with Continuing Education credits** – AGED provides informative webinars and training to educate professionals about in-depth subjects while earning continuing education credits necessary to maintain certifications.
- **Public Guardianship Support**– AGED is the administrative trustee for the Florida Public Guardianship Pooled Special Needs Trust. Retained funds directly support Public Guardianship.
- **Florida Public Guardian Coalition, Inc.** – Annual Corporate Sponsorship
- **The Florida Joint Public Policy Task Force for the Elderly & Disabled** – Continual support and sponsorship
- **Seniors Intervention Group** – Continual support and sponsorship